

COSMETISC STORE MANAGEMENT

Description :

Cosmetics Store Management in Salesforce is a solution that helps cosmetics stores manage their operations efficiently and effectively. The solution is built on the Salesforce platform, which provides a powerful and scalable platform for managing customer relationships, sales, and inventory. cosmetics stores improve their operational efficiency, enhance customer engagement, and drive growth.

Summary :

1. Key Features:Customer Management:

- **Contacts & Accounts:** Efficiently manage customer details, including contact information, purchase history, and preferences.
- **Customer Segmentation:** Segment customers based on various criteria such as purchase frequency, product preference, and location for targeted marketing.

2. Product Management:

- **Product Catalog:** Maintain an up-to-date catalog of cosmetic products with detailed descriptions, pricing, and availability.
- **Inventory Tracking:** Monitor stock levels, set reorder points, and track inventory turnover to ensure optimal stock levels.

3. Sales Management:

- **Order Processing:** Automate the order management process, including order creation, status tracking, and invoicing.
- **Sales Analytics:** Generate reports and dashboards to analyze sales trends, identify top-selling products, and forecast future sales.

4. Marketing & Promotions:

- **Campaign Management:** Create and manage marketing campaigns, including email promotions, discounts, and special offers.
- **Customer Engagement:** Use Salesforce tools to engage with customers through personalized offers and targeted marketing.

5. Customer Service:

- **Case Management:** Track and resolve customer service issues and complaints efficiently.
- **Knowledge Base:** Provide customers with access to a self-service portal for FAQs, product information, and troubleshooting.

6. Integration & Automation:

- **Salesforce Integration:** Integrate with other systems such as ERP or e-commerce platforms to ensure seamless data flow.
- **Workflow Automation:** Automate repetitive tasks and processes to increase operational efficiency and reduce manual errors

TASK 1 : Creating the Objects

To Create an object:

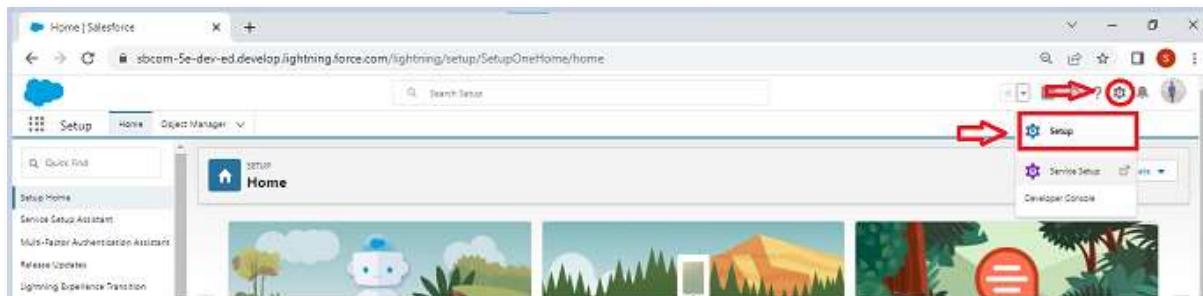
Creation of Objects for Urban Color, For this Urban Color we need to create 3 objects i.e., Our Customers, Consultants, Retailers, others.

The below steps will assist you in creating those objects.

- Click on the gear icon and then select Setup.
- Click on the object manager tab just beside the home tab.
- After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.
- Creation of Our Customer Object

On the Custom Object Definition page, create the object as follows:

- Label: Our Customer
- Plural Label: Our Customers
- Record Name: Our Customer
- Check the Allow Reports checkbox
- Check the Allow Search checkbox
- Click Save.
- Now create a custom tab. Click the Home tab, enter Tabs in Quick Find and select Tabs.
- Under Custom Object Tabs, click New.
- For Object, select Our Customer.
- For Tab Style, select any icon.
- Leave all defaults as is. Click Next, Next, and Save.



We need to create 4 objects named Our customer, Consultant, Retailer, Others.

For creating the another 3 objects, we need to follow the same procedure as mentioned above.

After the completion of object creation task, We'll move on to further steps.

TASK 2 : Creating Fields and Relationship

- An object relationship in Salesforce is a two-way association between two objects. Relationships are created by creating custom relationship fields on an object. This is done so that when users view records, they can also see and access related data.

Fields in Our Customers objects:

Fields in Our Customers objects follow below data types:

S No	Field Label	Data Type
1	Customer id	Auto Number
2	Customer Name	Text
3	Mobile Number	Phone
4	Email id	Email
5	Address	Text Area
6	Additional Information	Text Area

Fields in Consultants objects

Fields in Consultants objects follow below data types:

	2)Compact 3)EyeLiner 4)FacePack 5)Lip Balm 6)Nail Polish	Multi-Picklist
7	Payment 1)Debit Card 2)Credit Card 3)UPI 4)Cash	Picklist
8	Customer details	Lookup(Our Customers Object)
9	Address	Text Long

Fields in Retailers objects

Fields in Retailers objects follow below data types:

S No	Field Label	Data Type
1	Customer id	Auto Number
2	Customer Name	Text
3	Mobile Number	Phone
4	Email id	Email
5	Delivery Type 1)Self Pickup 2)Courier	Picklist
6	Products 1)Lipstick 2)Compact 3)EyeLiner 4)FacePack 5)Lip Balm	Multi-Picklist
	6)Nail Polish	
7	Payment 1)Debit Card 2)Credit Card 3)UPI 4)Cash	Picklist
8	Customer Details	Master-Detail Relationship (Our Customers Object)

Fields in Others objects

Fields in Others objects follow below data types:

S No	Field Label	Data Type
1	Name	Text
2	Employee 1)Company Employee 2)Staff 3)Special Reference	Picklist
3	Coupon	Text
4	Products 1)Lipstick 2)Compact 3)EyeLiner 4)FacePack 5)Lip Balm 6)Nail Polish	Multi-Picklist

- In the Cosmetic Store Management System built on Salesforce, fields and relationships are designed to streamline operations and enhance data management. Key fields include customer details (e.g., contact information and purchase history), product specifics (e.g., SKU, price, and inventory levels), order details (e.g., order status and shipping info), marketing campaign attributes, and case management elements. Relationships are structured to connect these fields efficiently: customers can have multiple orders and cases, each order can include multiple products, and products are linked to inventory and suppliers.

TASK 3 : Page Layout creation

From the Salesforce setup menu, go to "Object Manager" and select the Consultants object.

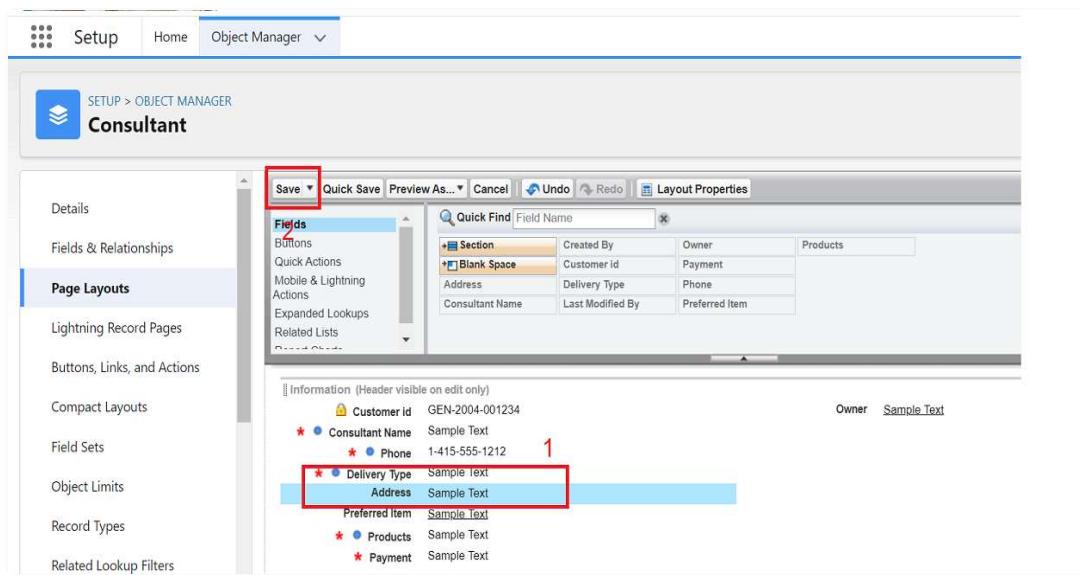
1. Click on "Page Layouts" in the left sidebar. This will display a list of available page layouts for the selected object.
2. Select the Consultant Layout page layout.

The screenshot shows the Salesforce Object Manager interface for the 'Consultant' object. The left sidebar has a 'Page Layouts' section highlighted with a red box and the number '1'. Below it, the 'Consultant Layout' is listed in the main content area with a red box and the number '2'. The main content area also includes a 'Page Layouts' header, a search bar, and buttons for 'New' and 'Page Layout Assignment'.

3. Click And Drag Delivery type and Address Fields Below Phone field.

The screenshot shows the Salesforce Page Layout editor for the 'Consultant' object. The left sidebar has a 'Page Layouts' section highlighted with a red box. The main content area displays the layout configuration. A red box highlights the 'Delivery Type' field in the list of fields below the 'Phone' field. The layout includes sections for 'Fields' and 'Information (Header visible on edit only)'.

4. Click on Save



- Creating a page layout in Salesforce involves navigating to the object manager, selecting the relevant object, and either creating a new layout or editing an existing one. You can design the layout by dragging and dropping fields, adding sections and related lists, and including buttons or links as needed. Customize field properties and section settings to suit user needs, then save and assign the layout to specific profiles or record types. Finally, preview and test the layout to ensure it is functional and meets user requirements.

TASK 4 : Creation of a Lightning App

- An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar
 - To create a lightning app page:
- Go to setup page --> search “app manager” in quick find --> select “app manager” --> click on New lightning App.

App Name	Developer Name	Description	Last Modified	App Type
1 All Tabs	AlTabset		04/12/2022, 10:19 am	Classic
2 Analytics Studio	Insights	Build CRM Analytics dashboards and apps	04/12/2022, 10:19 am	Classic
3 App Launcher	AppLauncher	App Launcher tabs	04/12/2022, 10:19 am	Classic
4 B2B Solutions	LightningB2B	Discover and manage business solutions designed for your industry	04/12/2022, 10:19 am	Lightning
5 Charter Desktop	Charter/Desktop	Charter Desktop is an Adobe AIR-based desktop application that lets Charter users stay connected...	23/12/2022, 4:04 pm	Connected (Managed)
6 Charter Mobile for BlackBerry	CharterMobile/BlackBerry	The Salesforce.com Charter mobile app lets you access Charter data on the go. Use it to view fe...	23/12/2022, 4:05 pm	Connected (Managed)
7 College Management System	Academy	demo app	08/12/2022, 4:18 pm	Lightning
8 Community	Community	Salesforce CRM Communities	04/12/2022, 10:19 am	Classic
9 Content	Content	Salesforce CRM Content	04/12/2022, 10:19 am	Classic
10 Data Manager	DataManager	Use Data Manager to view, limits, monitor usage, and manage recipes.	04/12/2022, 10:19 am	Lightning

- Fill the app name as Urban Color in app details and branding --> Next --> (App option page) keep it as default --> Next --> (Utility Items) keep it as default --> Next.

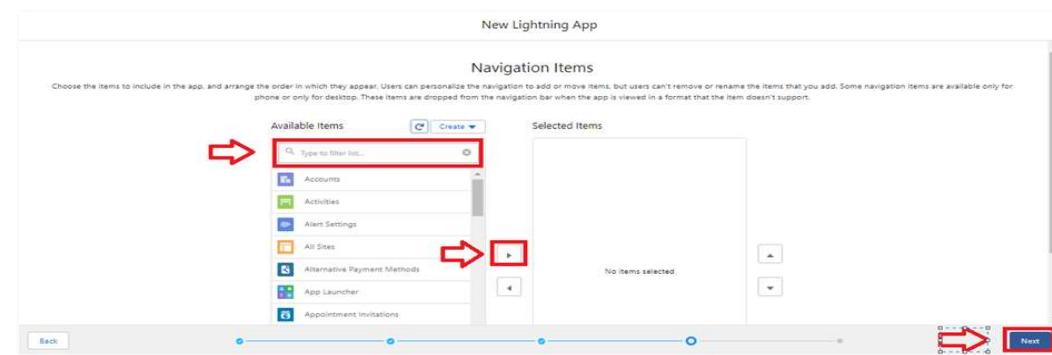
New Lightning App

App Details & Branding

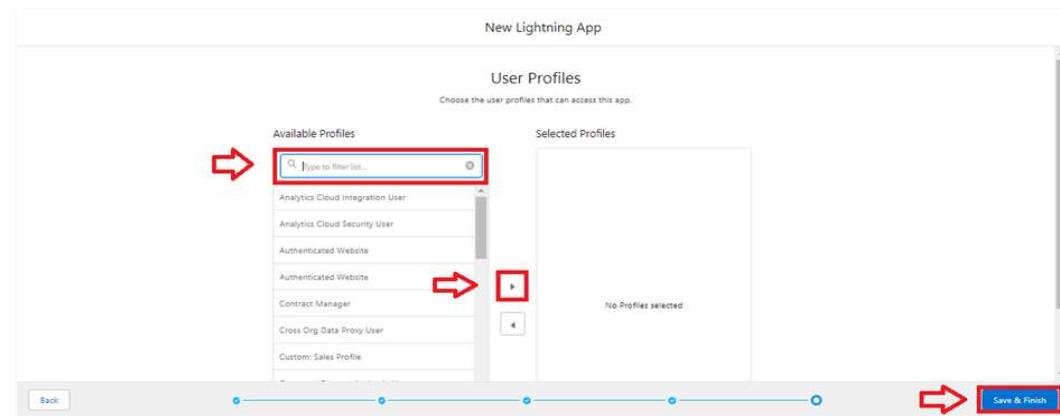
Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details	App Branding
<input style="width: 100%;" type="text" value="App Name"/> Name your app...	<input style="width: 100%;" type="text" value="Developer Name"/> Enter a developer name...
<input style="width: 100%;" type="text" value="Description"/> Enter a description...	Primary Color Hex Value <input type="color" value="#007002"/> #007002 <input type="button" value="Upload"/>
Org Theme Options <input type="checkbox"/> Use the app's image and color instead of the org's custom theme	
App Launcher Preview	

- To Add Navigation Items:



4. Select the items (Our Customers, Consultants, Retailers, Others, Reports, Dashboards) from the search bar and move it using the arrow button --> Next.
5. To Add User Profiles:



6. Search profiles (System administrator) in the search bar --> click on the arrow button --> save & finish.

TASK 5 : Creating Profiles

- A profile is a group/collection of settings and permissions that define what a user can do in salesforce. A profile controls "Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login IP ranges.

Creating a Profiles: Now create a Store Supervisor profile and set its object permissions.

Creating a Profiles:

Now create a Store Supervisor profile and set its object permissions.

- From Setup enter Profiles in the Quick Find box, and select Profiles.
- From the list of profiles, find Standard User.
- Click Clone.
- For Profile Name, enter Store Supervisor.
- Click Save.
- While still on the Store Supervisor profile page, then click Edit.

- Scroll down to Custom Object Permissions and give access for Create,Read,Edit,Delete,View all and modify all for Our Customers,Consultants,Retailers,Others.
- Scroll down to Custom App Settings and give access for Urban Color.

To create a new profile:

1. Go to setup --> type profiles in quick find box --> click on profiles --> clone the desired profile (standard user is preferable) --> enter profile name --> save.
2. While still on the profile page, then click Edit.

The screenshot shows two instances of the Salesforce Setup Profiles page. The top instance displays the 'Store Supervisor' profile, which has been cloned. The cloned profile's details are as follows:

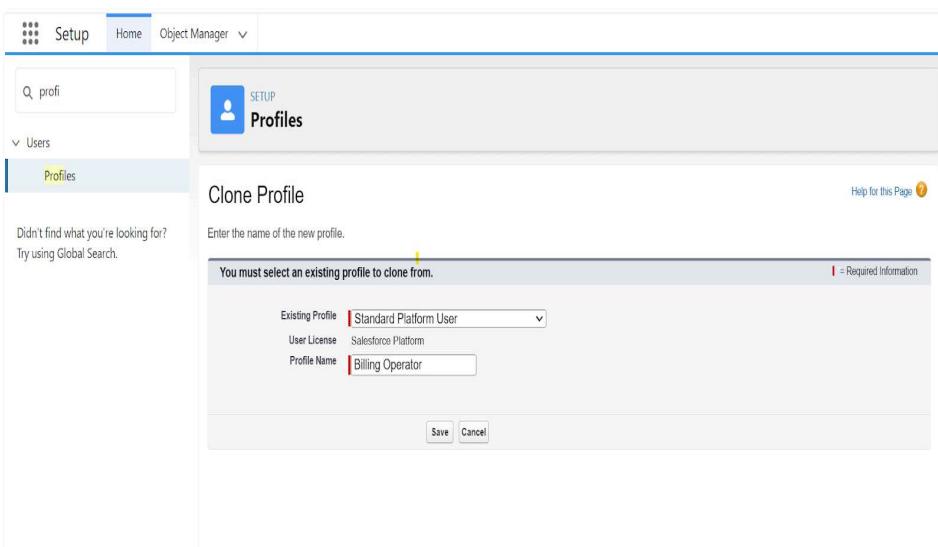
- Name:** Store Supervisor
- User License:** Salesforce
- Description:** (empty)
- Custom Profile:**

The bottom instance shows a list of standard profiles, with several checkboxes checked, indicating they have been selected for cloning. These include:

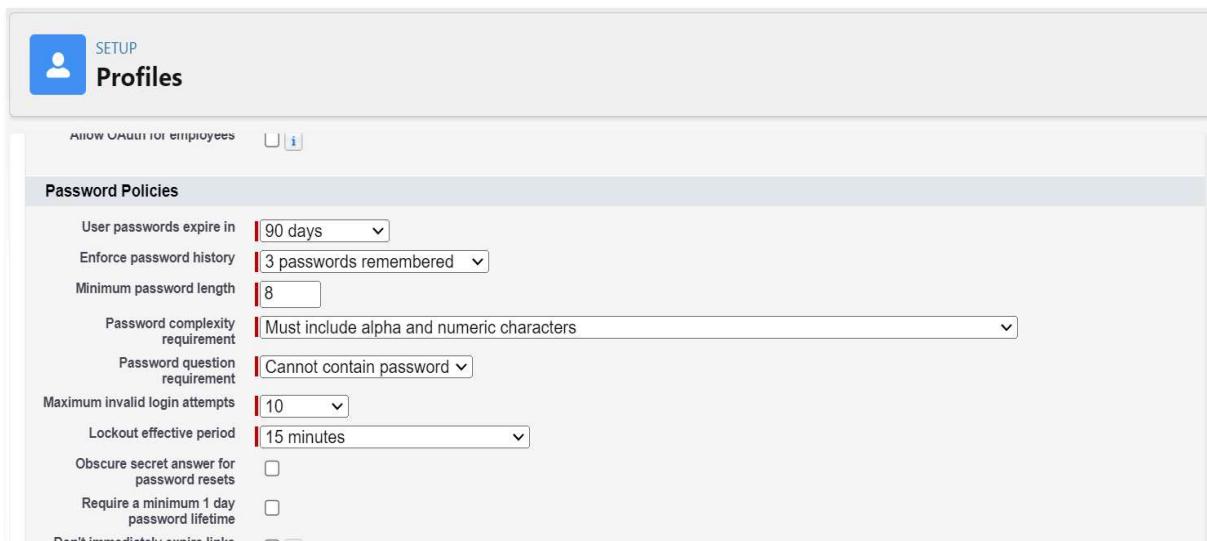
- (standard_LightningUser)
- Community (standard_Community)
- Content (standard_Content)
- Data Manager (standard_DataManager)
- Digital Experience (standard_SalesforceCMS)
- Lightning Usage App (standard_LightningInstrumentation)
- LVC LEARNINGS (LVC_LEARNINGS)
- Marketing (standard_Marketing)
- Queue Management (standard_QueueManagement)
- Rental Management (Rental_Management)
- (standard_Canner)
- Salesforce Scheduler Setup (standard_LightningScheduler)
- Sample Console (standard_ServiceConsole)
- Service (standard_Service)
- Service Console (standard_LightningService)
- Site.com (standard_Sites)
- Subscription Management (standard_RevenueCloudConsole)
- Urban Color (Urban_Color)
- Vehicle Management (Vehicle_Management)
- VDC (standard_Work)

A note at the bottom of the cloned profile page states: "Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing the user's profile or by changing the user's record type settings. If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile." Below this, there are links for "Edit", "Clone", "Delete", and "View Users".

3. Click on Save.
4. Similarly Create operator profile ,Clone Salesforce Platform user and give access only for Billing Operator.



5. Click On Save.



TASK 6 : Setting up Roles

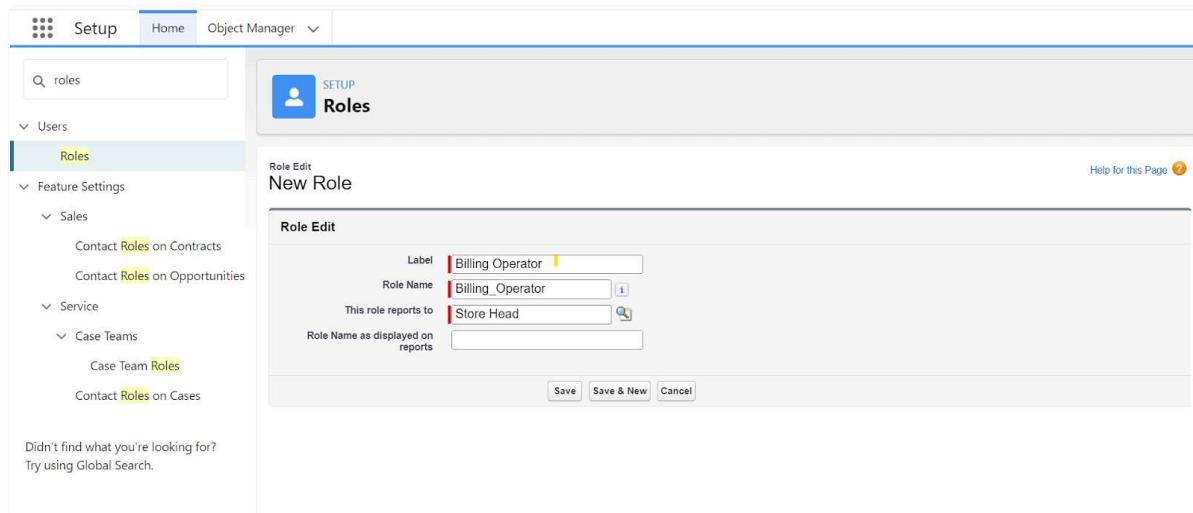
- Roles are record-level access controls that define what data a user can see in Salesforce.

1. Click on the Gear Icon
2. Click "Setup"
3. In the Quick Find box, enter "Roles"
4. Click "Roles"
5. Click on "Set Up Roles"
6. Click "Expand All"
7. Under the CEO, click on "Add Role"
8. Fill up the Label as Store Head, Role Name Store_Head.

9. Enter a Role name that will be displayed on Reports

10. Click on Save .

Similarly create One Roles under Store Head as Billing Operator.



Your Organization's Role Hierarchy

[Collapse All](#) [Expand All](#)



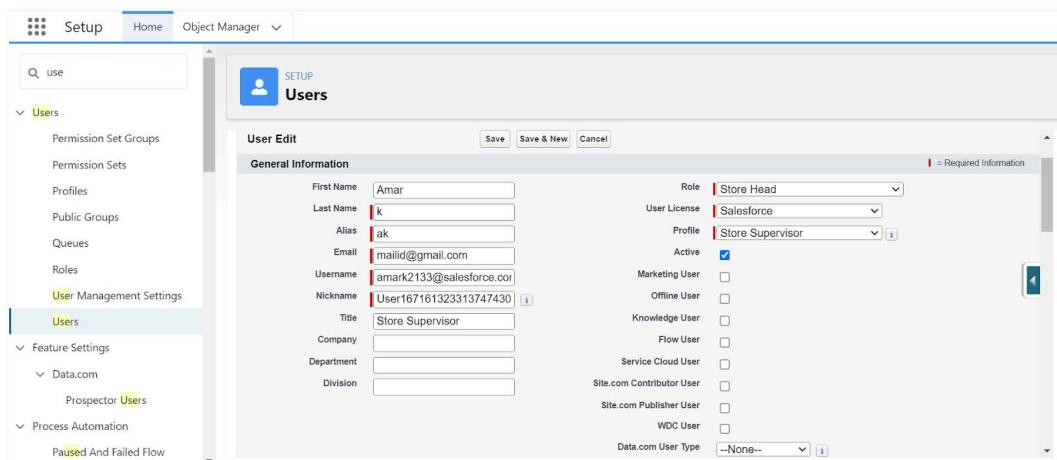
In Salesforce, roles define the hierarchy and access levels for users within an organization. Roles determine the visibility of records and data sharing based on an employee's position and responsibilities. By establishing a role hierarchy, Salesforce allows users to access and manage records owned by users in roles below them in the hierarchy. This ensures that managers can oversee the work of their subordinates while maintaining data security and privacy. Roles are crucial for configuring access controls, enabling effective data sharing, and facilitating proper reporting within Salesforce.

TASK 7 : Creation of an User

- In Salesforce, a user represents an individual who has access to the Salesforce platform and its functionalities. Each user is assigned a unique username, and their access level and permissions are defined by their profile and role within the organization. Users can perform tasks such as managing records, running reports, and collaborating with team members based on their assigned permissions. Salesforce administrators configure user settings, including login credentials, security settings, and access to various features and data, ensuring that users can efficiently and securely perform their job functions.

1. From Setup, in the Quick Find box, enter Users, and then select Users.
2. Click New User.
3. Enter the user's name Amar K and (Your) email address and a unique username in the form of an email address. By default, the username is the same as the email address.
4. Select a Role(Store Head)
5. Select a User Licence As Salesforce.
6. Select a profile as Store Supervisor.
7. Check Generate new password and notify the user immediately to have the user's login name and a temporary password emailed to your email.

Fill in the fields (first name, last name, alias, email id, username, nick name, role, user licence, profiles) --> save.



TASK 8 : Creating/Modifying Records

- Creating or modifying records in Salesforce involves navigating to the relevant object tab, clicking “New” to create a record or “Edit” to update an existing one. For creating records, users fill out the necessary fields and click “Save” to store the new data. For modifications, users locate the record, make the desired changes in the editable fields, and then click “Save” to apply the updates. This process ensures accurate and up-to-date information within the Salesforce system.

Steps to Create a Record:

- 1. Navigate to the Object Tab:**
 - Log in to Salesforce and go to the relevant object tab (e.g., Accounts, Contacts, Opportunities).
- 2. Click “New”:**
 - On the object’s home page or list view, click the “New” button to initiate the creation of a new record.
- 3. Enter Record Information:**
 - Complete the fields in the record form with the required and optional data. This may include details like names, addresses, dates, and other relevant information.
- 4. Save the Record:**
 - Once all necessary information is entered, click “Save” to create and store the new record in Salesforce.

Steps to Modify a Record:

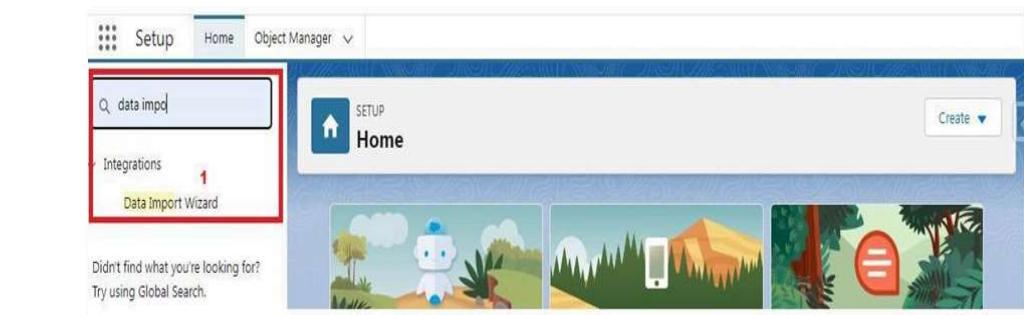
- 1. Find the Record:**
 - Locate the record you want to modify by using the object’s list view, search function, or related lists.
- 2. Open the Record:**
 - Click on the record’s name to open it and view its details.
- 3. Click “Edit”:**
 - In the record’s detail view, click the “Edit” button to enable editing mode.
- 4. Update Record Information:**
 - Make the necessary changes to the fields as required. Ensure all required fields are correctly filled out.
- 5. Save the Changes:**
 - After making the updates, click “Save” to apply and store the modifications.

These steps ensure that records are properly created and updated, maintaining accurate and current data in Salesforce.

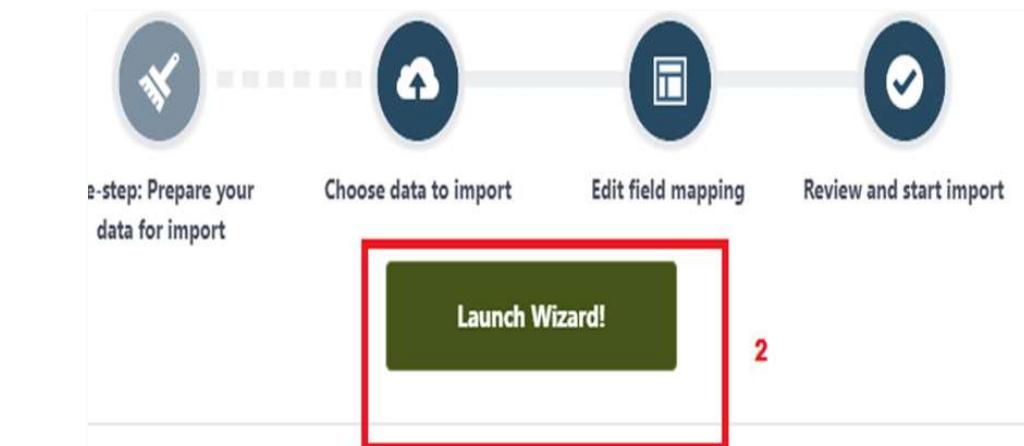
TASK 9 : Importing Data

- **Data Import Wizard**—this tool, accessible through the Setup menu, lets you import data in common standard objects, such as contacts, leads, accounts, as well as data in custom objects.

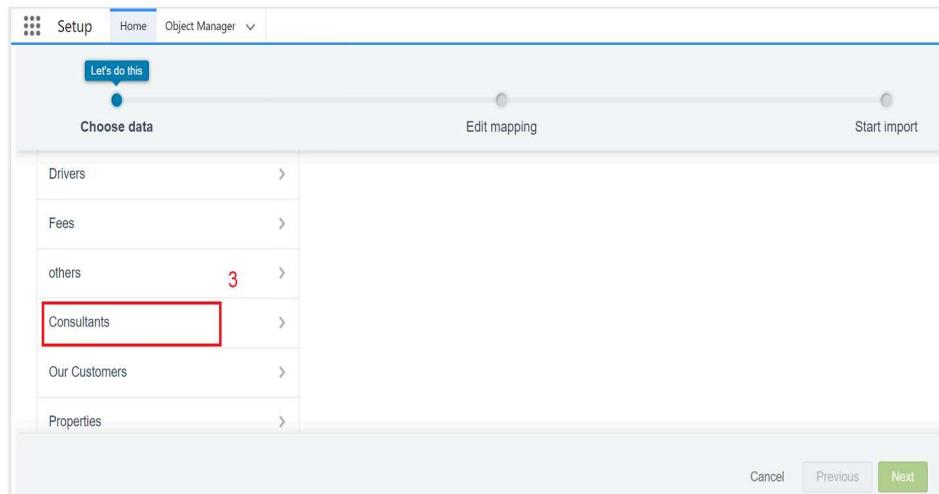
1. From Setup, click the Home tab.
2. In the Quick Find box, enter Data Import and select Data Import Wizard



3. Click Launch Wizard!



4. Click the Custom Objects tab and select the Consultant object.



5. Select Add new records.

The screenshot shows the 'Import your Data into Salesforce' screen. It has three main sections: 'What kind of data are you importing?' (Standard objects, Custom objects), 'What do you want to do?' (Add new records, Update existing records, Add new and update existing records), and 'Where is your data located?'. The 'Add new records' option is highlighted with a red box and labeled with a red '4'.

6. Click CSV and choose file Consultant_CS1 which we made earlier. Click Next.

The screenshot shows the 'Edit mapping' step of the import wizard. It includes sections for 'What kind of data are you importing?' (Standard objects, Custom objects), 'What do you want to do?' (Add new records checked), and 'Where is your data located?'. In the 'Where is your data located?' section, a 'CSV' file is selected and highlighted with a red box and labeled with a red '5'. At the bottom right are 'Cancel', 'Previous', and 'Next' buttons, with 'Next' highlighted by a red box.

7. Since the field names in the CSV file (CSV Header) are the same as the field names in your object (Mapped Salesforce Object), the fields are automatically mapped. Click Next

The screenshot shows the 'Edit Field Mapping' step of the Data Import Wizard. The progress bar at the top is almost complete. The main area displays a table mapping CSV headers to Salesforce fields. The 'Email' row in the table is highlighted with a red border.

Edit	Mapped Salesforce Object	CSV Header	Example	Example	Example
Change	Consultant Name	Consultant Name	Dev Raj	Ajith	Babu
Change	Mobile Number	Mobile Number	9846538732	784653673	902839439
Change	Delivery Type	Delivery Type	Self Pickup	Courier	Self Pickup
Change	Address	Address		Hyderabad	
Change	Products	Products	Lipstick	Compact	Face Pack
Change	Payment	Payment	Cash	UPI	Credit Card
Change	Email	Email		ajith@gmail.com	Babu24@gmail.com

Buttons at the bottom include 'Cancel', 'Previous', and a green 'Next' button.

8. The next screen gives you a summary of your data import. Click Start Import.

The screenshot shows the 'Review & Start Import' step. It displays a summary of the import settings:

- Your selections: Consultants, Add new records, Consultants - Sheet1 (2).csv
- Your import will include: Mapped fields 7
- Your import will not include: Unmapped fields 0

Buttons at the bottom include 'Cancel', 'Previous', and a green 'Start Import' button.

9. Click OK on the popup.

The screenshot shows a confirmation message:

Congratulations, your import has started!
Click OK to view your import status on the Bulk Data Load Job page.

A large green 'OK' button is centered at the bottom of the message box.

10. Scroll down the page and verify that your data has been imported under batches.

Batches							
View Request	View Result	Batch ID	Start Time	End Time	Total Processing Time (ms)	API Active Processing Time (ms)	Apex Processing Time (ms)
					Records Processed	Records Failed	Retry Count
View Request	View Result	7512w00000Xqar	6/19/2023, 11:05 PM	6/19/2023, 11:05 PM	103	52	0

11. Make sure you have 0 records under the records failed column.

Note - Do Field mapping carefully.

TASK 10 : Accessing Reports

Creating Report :

Click App Launcher

2.Select Urban Color App

3.Click reports tab

4.Click New Report.

5.Click the report type as Consultants Click Start report.

6.Customize your report, in Columns select - ConsultantName,Delivery type,Products,Payment.

7.Click on the drop down option on the payment column and select Bucket this column.

8.Bucket Name as Payment type

9.Click on Add Bucket and name it as NetBanking

10.Click on Add Bucket and name it as Cash

11.Now Click on All Values and select Credit card,Debit card,Upi and Move to Net Banking.

12.Now Click on All Values again and select Cash and Move to Cash.

13.Click on Apply.

Setup Home Object Manager

Q: ur 2

S: Apps S: Urban Color

Items

H: Asset Action Sources R: Data Use Purpose L: Operating Hours A: Our Customers S: Return Orders Li: View More

Optimizer

ADMINISTRATION > Users > Data > Email

PLATFORM TOOLS > Subscription Management > Apps > Feature Settings

Get Started with Einstein Bots

Mobile Publisher

Real-time Collaborative Docs

Most Recently Used

10 items

NAME	TYPE	OBJECT
Customer Details	Custom Field Definition	Consultant

Get Started Learn More Get Started

Get Started

Learn More

Get Started

Urban Color Our Customers Consultants Retailers others Reports Dashboards

1

Reports Recent 3 items

REPORTS Report Name Description Folder Created By Created On Subscribed

Q: Search recent reports... New Report New Folder

2

REPORT New Consultants Report Consultants

Fields > Outline Filters

Groups GROUP ROWS Add group...

Columns Add column... Consultant: Consultant Name Delivery Type Products Payment

Previews a limited number of records. Run the report to see everything.

Consultant: Consultant Name	Delivery Type	Products	Payment
1 Dev Raj	Self Pickup	Lipstick	Cash
2 Ajith	Courier	Compact	Upi
3 Babu	Self Pickup	Face Pack	Credit Card
4 Chitra	Courier	Eye Liner	Debit Card
5 Swathi	Courier	Nail Polish	Upi
6 Prasad	Self Pickup	Eye Liner	Upi
7 Ajay Kumar	Courier	Lip Balm	Debit Card
8 Shankar	Self Pickup	Face Pack	Cash
9 Sandeep	Courier	Eye Liner	Upi

Add Chart Save & Run Save Close Run

Update Preview Automatically

REPORT ▾

New Consultants Report / Consultants

Fields > Outline Filters Previewing a limited number of records. Run the report to see everything.

Groups

- GROUP ROWS
- Add group...

Columns

- Add column...

Consultant: Consultant Name

Delivery Type

Products

Payment

1

	Consultant: Consultant Name	Delivery Type	Products	Payment
1	Dev Raj	Self Pickup	Lipstick	Cash
2	Ajith	Courier	Compact	Upi
3	Babu	Self Pickup	Face Pack	Credit Card
4	Chitra	Courier	Eye Liner	Debit Card
5	Swathi	Courier	Nail Polish	Upi
6	Prasad	Self Pickup	Eye Liner	Upi
7	Ajay Kumar	Courier	Lip Balm	Debit Card
8	Shankar	Self Pickup	Face Pack	Cash
9	Sandeep	Courier	Eye Liner	Upi

2

Update Preview Automatically

Sort Ascending

Sort Descending

Group Rows by This Field

Group Columns by This Field

Show Unique Count

Bucket This Column

Move Left

Move Right

Remove Column

Edit Bucket Column

* Field: Payment

* Bucket Name: Payment type

All Values (4)	Search Values:
Unbucketed Values (4)	<input type="checkbox"/> VALUE <input type="checkbox"/> Credit Card <input type="checkbox"/> Debit Card <input type="checkbox"/> Upi <input type="checkbox"/> Cash
<input type="checkbox"/> Bucket remaining values as Other	
<input type="button" value="Add Bucket"/>	<input type="button" value="Move To"/>
<input type="button" value="Cancel"/> <input type="button" value="Apply"/>	

Edit Bucket Column

* Field * Bucket Name

Payment	X	Payment type
---------	---	--------------

All Values (4)

Net Banking (0)		
Cash (0)		

Unbucketed Values (4)

Bucket remaining values as Other

Add Bucket Move To ▾

Search Values

VALUE	BUCKET
<input type="checkbox"/> Credit Card	
<input type="checkbox"/> Debit Card	
<input type="checkbox"/> Upi	
<input type="checkbox"/> Cash	

Cancel Apply

Edit Bucket Column

* Field * Bucket Name

Payment	X	Payment type
---------	---	--------------

All Values (4)

Net Banking (0)		
Cash (0)		

Unbucketed Values (4)

Bucket remaining values as Other

Add Bucket Move To ▾

Search Values

VALUE	BUCKET
<input checked="" type="checkbox"/> Credit Card	
<input checked="" type="checkbox"/> Debit Card	
<input checked="" type="checkbox"/> Upi	
<input type="checkbox"/> Cash	

Edit Bucket Column

* Field * Bucket Name

Payment	X	Payment type
---------	---	--------------

All Values (4)

Net Banking (0)																
Cash (0)																
Unbucketed Values (4)																
Search Values																
<table border="1"> <thead> <tr><th>VALUE</th><th>BUCKET</th></tr> </thead> <tbody> <tr><td><input checked="" type="checkbox"/> Credit Card</td><td></td></tr> <tr><td><input checked="" type="checkbox"/> Debit Card</td><td></td></tr> <tr><td><input type="checkbox"/> Net Banking</td><td></td></tr> <tr><td><input type="checkbox"/> Cash</td><td></td></tr> <tr><td colspan="2">Unbucketed Values</td></tr> <tr><td colspan="2">New Bucket</td></tr> </tbody> </table>			VALUE	BUCKET	<input checked="" type="checkbox"/> Credit Card		<input checked="" type="checkbox"/> Debit Card		<input type="checkbox"/> Net Banking		<input type="checkbox"/> Cash		Unbucketed Values		New Bucket	
VALUE	BUCKET															
<input checked="" type="checkbox"/> Credit Card																
<input checked="" type="checkbox"/> Debit Card																
<input type="checkbox"/> Net Banking																
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Cancel Apply

Edit Bucket Column

* Field * Bucket Name

Payment	X	Payment type
---------	---	--------------

All Values (4)

Net Banking (3)												
Cash (0)												
Unbucketed Values (1)												
Search Values												
<table border="1"> <thead> <tr><th>VALUE</th><th>BUCKET</th></tr> </thead> <tbody> <tr><td><input type="checkbox"/> Credit Card</td><td>Net Banking</td></tr> <tr><td><input type="checkbox"/> Debit Card</td><td>Net Banking</td></tr> <tr><td><input type="checkbox"/> Upi</td><td>Net Banking</td></tr> <tr><td><input checked="" type="checkbox"/> Cash</td><td></td></tr> </tbody> </table>			VALUE	BUCKET	<input type="checkbox"/> Credit Card	Net Banking	<input type="checkbox"/> Debit Card	Net Banking	<input type="checkbox"/> Upi	Net Banking	<input checked="" type="checkbox"/> Cash	
VALUE	BUCKET											
<input type="checkbox"/> Credit Card	Net Banking											
<input type="checkbox"/> Debit Card	Net Banking											
<input type="checkbox"/> Upi	Net Banking											
<input checked="" type="checkbox"/> Cash												
<input type="checkbox"/> Bucket remaining values as Other												
Add Bucket	Move To											

Cancel Apply

Edit Bucket Column

* Field	* Bucket Name				
Payment	Payment type				
All Values (4) Net Banking (3) Edit Cash (1) Edit Unbucketed Values (0) <input type="checkbox"/> Bucket remaining values as Other	Search Values X <table border="1" style="width: 100%; border-collapse: collapse; font-size: small;"> <thead> <tr> <th style="width: 10%;">Value</th> <th style="width: 10%;">Bucket</th> </tr> </thead> <tbody> <tr> <td style="background-color: #e0f2e0;"><input checked="" type="checkbox"/> Cash</td> <td style="background-color: #e0f2e0;"> Cash</td> </tr> </tbody> </table>	Value	Bucket	<input checked="" type="checkbox"/> Cash	Cash
Value	Bucket				
<input checked="" type="checkbox"/> Cash	Cash				
Add Bucket	Move To ▾				
Cancel Apply					

14.In Group Rows Add Payment Type Bucket Field.

15.Click refresh

16.Click Save and Run

17.Give report name – Consultant report

18.Click Save

REPORT ▾

New Consultants Report ▾ Consultants

Fields	Groups	Previewing a limited number of records. Run the report to see everything.				
Fields	Groups	Consultant: Consultant Name	Delivery Type	Products	Payment	Payment type
	GROUP ROWS	1 Dev Raj	Self Pickup	Lipstick	Cash	Cash
		2 Ajith	Courier	Compact	Upi	Net Banking
		3 Babu	Self Pickup	Face Pack	Credit Card	Net Banking
		4 Chitra	Courier	Eye Liner	Debit Card	Net Banking
		5 Swathi	Courier	Nail Polish	Upi	Net Banking
		6 Prasad	Self Pickup	Eye Liner	Upi	Net Banking
		7 Ajay Kumar	Courier	Lip Balm	Debit Card	Net Banking
		8 Shankar	Self Pickup	Face Pack	Cash	Cash
		9 Sandeep	Courier	Eye Liner	Upi	Net Banking

Columns Add column...

- Consultant: Consultant Name X
- Delivery Type X
- Products X
- Payment X
- Payment type X

REPORT ▾ New Consultants Report **Consultants**

Fields > Outline Filters

Groups

- GROUP ROWS
- Payment type

GROUP COLUMNS

-

Columns

-
- Consultant: Consultant Name
- Delivery Type
- Products
- Payment

Previewing a limited number of records. Run the report to see everything.

Payment type ↑ ↓	Consultant: Consultant Name	Delivery Type	Products	Payment
Net Banking (7)	Ajith Babu Chitra Swathi Prasad Ajay Kumar Sandeep	Courier Self Pickup Courier Courier Self Pickup Courier Courier	Compact Face Pack Eye Liner Nail Polish Eye Liner Lip Balm Eye Liner	Upi Credit Card Debit Card Upi Upi Debit Card Upi
	Subtotal			
	Cash (2)	Dev Raj Shankar	Self Pickup Self Pickup	Lipstick Face Pack
	Subtotal			
	Total (9)			

Save Report

1

*Report Name

Report Unique Name

Report Description

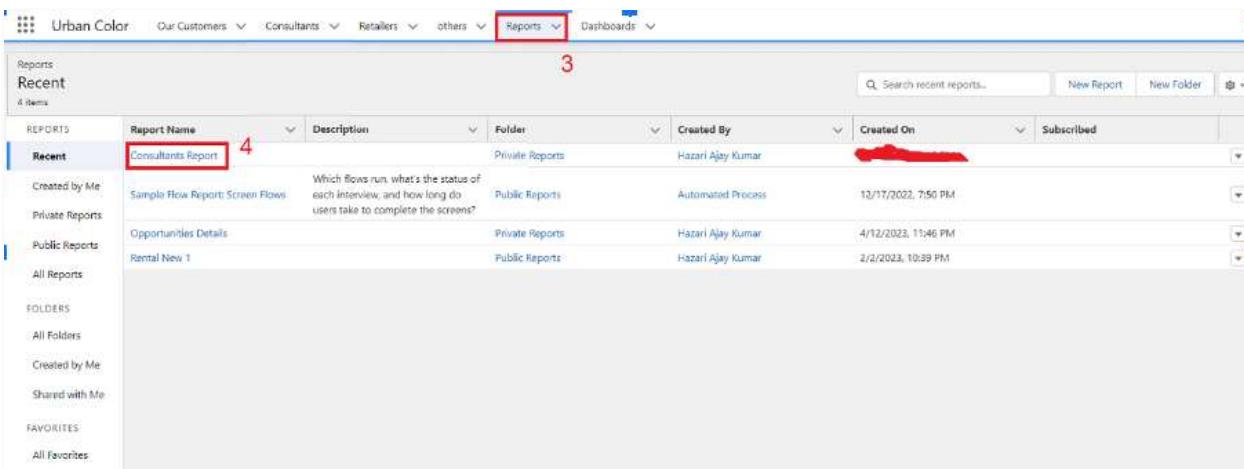
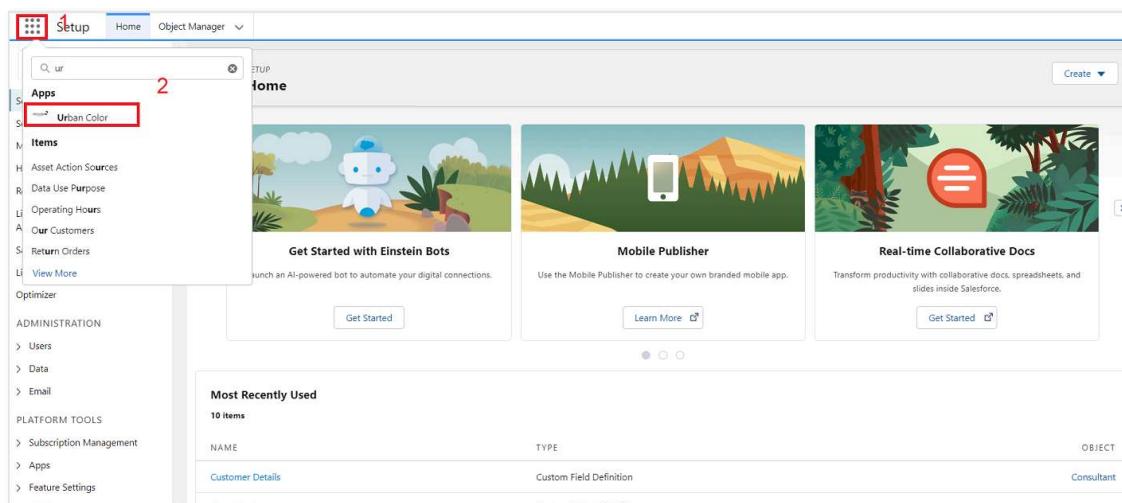
2

Folder

3

View Reports :

1. Click on App Launcher on the left side of the screen.
2. Search Urban Color App & click on it.
3. Click on Reports Tab.
4. Click on Urban Color Report and see records



TASK 11 : Working with dashboards

Create Dashboard :

1. Click on the Dashboards tab from the Urban Color application.
2. Click on the new dashboard.
3. Give name- Consultant Dashboard
4. Click create
5. Give your dashboard a name and click on +component
6. Select the Consultants Report which you created.
7. For the data visualization select any of the chart, table etc. as per your choice/requirement.
8. Click add.
9. Click save.

The screenshot shows the 'Dashboards' section of a software interface. At the top, there are navigation links: 'Urban Color', 'Our Customers', 'Consultants', 'Retailers', 'others', 'Reports', and 'Dashboards'. The 'Dashboards' link is highlighted with a red box and the number '1'. Below the navigation is a search bar labeled 'Search recent dashboards...' and a button 'New Dashboard' which is also highlighted with a red box and the number '2'. A table below lists 'DASHBOARDS' with columns: 'Dashboard Name', 'Description', 'Folder', 'Created By', 'Created On', and 'Subscribed'. There are two items listed.

This screenshot shows the 'New Dashboard' dialog box. It has a title 'New Dashboard'. The first field is '* Name' with the value 'Consultant Dashboard' highlighted with a red box and the number '3'. Below it is a 'Description' field with an empty input box. The next section is 'Folder' with a dropdown menu showing 'Private Dashboards' highlighted with a red box and the number '4'. At the bottom right are 'Cancel' and 'Create' buttons, with 'Create' highlighted with a red box and the number '5'.

The screenshot shows the 'Consultant Dashboard' page. At the top, there are navigation links: 'Urban Color', 'Our Customers', 'Consultants', 'Retailers', 'others', 'Reports', and 'Dashboards'. The 'Dashboards' link is highlighted with a red box and the number '6'. Below the navigation is a toolbar with icons for search, filter, and save, and a button '+ Component' which is highlighted with a red box and the number '5'.

This screenshot shows the 'Select Report' dialog. On the left, there are sections for 'Reports' (Recent, Created by Me, Private Reports, Public Reports, All Reports) and 'Folders' (Created by Me, Shared with Me, All Folders). The main area is titled 'Select Report' with a search bar 'Search Reports and Folders...'. A list of reports is shown, with 'Consultants Report' highlighted with a red box and the number '6'. At the bottom right are 'Cancel' and 'Select' buttons, with 'Select' highlighted with a red box and the number '7'.

Add Component

Report

Consultants Report ×

Use chart settings from report i

Display As

1. Axis

Payment type

X-Axis

Record Count

Preview

Consultants Report

Record Count

Payment type	Record Count
Net Banking	7
Cash	2

[View Report \(Consultants Report\)](#)

Cancel
Add

Consultant Dashboard

Consultants Report

Record Count

Payment type	Record Count
Net Banking	7
Cash	2

[View Report \(Consultants Report\)](#)

Save
9
Done

View DashBoard :

1. Click on App Launcher on the left side of the screen.
2. Search Candidate Internal Result Card & click on it.
3. Click on Dashboard Tab.
4. Click on Candidate Internal Result Card see graph view of records

1

Setup Home Object Manager

2

Apps **Urban Color**

Items

Asset Action Sources
Data Use Purpose
Operating Hours
Our Customers
Return Orders
View More

Optimizer

ADMINISTRATION

> Users
> Data
> Email

PLATFORM TOOLS

> Subscription Management
> Apps
> Feature Settings

SEARCH

Home

Get Started with Einstein Bots

Mobile Publisher

Real-time Collaborative Docs

Get Started Learn More Get Started

Most Recently Used

10 items

NAME	TYPE	OBJECT
Customer Details	Custom Field Definition	Consultant

Get Started

Learn More

Get Started

3

Urban Color Our Customers Consultants Retailers others Reports Dashboards

Recent

3 items

DASHBOARDS

Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Consultant Dashboard		Private Dashboards	Hazari Ajay Kumar	6/20/2023, 10:46 PM	
Opportunities Details		Private Dashboards	Hazari Ajay Kumar	4/12/2023, 11:57 PM	

Created by Me

Private Dashboards

All Dashboards

FOLDERS

Search recent dashboards... New Dashboard New Folder